

## Message Text

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TO SECSTATE WASHDC 9635

INFO AMEMBASSY ATHENS

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C O N F I D E N T I A L SECTION 1 OF 2 ANKARA 4744

E.O. 11652: GDS

TAGS: PINT, ECON, TU

SUBJ: DEMIREL GOVERNMENT'S FIRST TWO MONTHS

BEGIN SUMMARY: IN THE TWO MONTHS SINCE ITS INITIAL VOTE OF  
CONFIDENCE APRIL 12, THE DEMIREL GOVERNMENT HAS STRENGTHENED  
SOMEWHAT ITS NARROW PARLIAMENTARY BASE AND HAS ENACTED  
MUCH OF ITS PROGRAM. STRAINS AMONG THE COALITION PARTNERS DO NOT  
YET APPEAR DANGEROUS. ON THE ECONOMIC FRONT, THE GOVERNMENT'S  
PROGRAMS ARE POPULAR BUT EXPENSIVE. AT THE MOMENT, THE GOVERN-  
MENT SEEMS TO BE RIDING AN UPWARD WAVE. END SUMMARY.

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1. DOMESTIC POLITICAL PERFORMANCE:

A. DEMIREL NOW IS IN A STRONGER POSITION THAN TWO MONTHS AGO. THE MILITARY SEEM SATISFIED WITH HIS STEWARDSHIP. HIS PARLIAMENTARY OPPOSITION HAS BEEN WEAKENED BY ADDITIONAL DEFECTIONS, AND THE LATEST TEST OF STRENGTH SHOWED A 12-VOTE MARGIN. THE NATIONAL ASSEMBLY IS LIKELY TO ADJOURN IN EARLY JULY FOR A RECESS THAT COULD LAST UNTIL NOVEMBER 1, LEAVING HIM FREE TO GOVERN WITHOUT FEAR OF BEING UNSEATED IN A VOTE OF CONFIDENCE DURING THAT PERIOD.

B. THE GOVERNMENT HAS LEGISLATED AND/OR ENACTED BY DECREE MANY MEASURES WHICH SHOULD DO MUCH TO INCREASE ITS POPULARITY WITH VILLAGERS, FARMERS, AND WOMEN -- THE TRADITIONAL SOURCES OF JUSTICE PARTY SUPPORT (SEE PARA 3). DEMIREL CAN CLAIM WITH SOME JUSTIFICATION THAT DOMESTICALLY HIS GOVERNMENT HAS ACCOMPLISHED MORE IN TWO MONTHS THAN ECEVIT GOVERNMENT ACCOMPLISHED IN ITS SEVEN MONTHS OF POWER.

C. THE GOVERNMENT HAS EXHIBITED A DEGREE OF INTERNAL SOLIDARITY CONSIDERABLY GREATER THAN WAS GENERALLY EXPECTED TWO MONTHS AGO. ALTHOUGH RELATIONS AMONG THE COALITION PARTNERS ARE SAID TO DE MADE DIFFICULT BY DEPUTY PRIMIN ERBAKAN AND HIS NATIONAL SALVATION IARTY (NSP), WITH WHOM NO OTHER PARTY GETS ALONG WELL, THERE IS NO EVIDENCE OF DISSENSION SERIOUS ENOUGH TO BRING DOWN THE GOVERNMENT. THE COALITION PARTNERS HAVE PROVIDED EACH OTHER COMPLETE PUBLIC SUPPORT. HE MAJOR OPPOSITION GROUIJN E REPUBLICAN PEOPLE'S PARTY JKRPP), HAS NOT BEEN ABLE TO FIND AN ISSUE TO DIVIDE THE GOVERNMENT PARTIES.

D. ERBAKAN, ALTHOUGH PERIODICALLY AN EMBARRASSMENT TO DEMIREL BECAUSE OF PREMATURE OR ERRONEOUS STATEMENTS ON DOMESTIC TOPICS, HAS HEWED TO THE GOVERNMENT LINE IN DISCUSSING CYPRUS AND AEGEAN POLICY. IT IS SPECULATED THAT THE PRICE FOR HIS ADHERENCE WAS THE AWARD TO THE NSP OF SIGNIFICANT INFLUENCE IN ECONOMIC PLANNING AND A GENEROUS SHARE OF MINISTERIAL, SENIOR-LEVEL GOVERNMENT AND STATE ECONOMIC ENTERPRISE POSITIONS. THE SHARE HAS BEEN SO DISPROPORTIONATE THAT IT CAUSED THE 18-MEMBER INDEPENDENT GROUP (WHOSE PARLIAMENTARY SUPPORT IS ESSENTIAL TO THE GOVERNMENT) TO PROTEST. A COMMITTEE REPRESENTING THE INDEPENDENTS

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MET JUNE 13 WITH DEMIREL AND THE DEPUTY PRIME MINISTERS AND REPORTEDLY ATTACKED NSP EXTREMISM AND DEMANDED THAT THEY BE INCLUDED IN PLANNING GOVERNMENT POLICY OR THEY WOULD WITHDRAW THEIR SUPPORT FROM THE GOVERNMENT. IT IS STILL TOO EARLY TO ASSESS THE SERIOUSNESS OF THIS THREAT, BUT IT DOES NOT YET APPEAR TO BE AN INSUPERABLE PROBLEM. ON THE OTHER HAND, THE NATIONALIST FRONT ALLIANCE MAY WELL FACE ITS GREATEST CHALLENGE DURING THE CAMPAIGN PERIOD THIS FALL AS THE NSP WILL

LIKELY TAKE AN INCREASINGLY INDEPENDENT LINE.

E. THE FAR-RIGHT NATIONALIST ACTION PARTY (NAP) HAS SO FAR NOT PROVED TO BE A POLITICAL EMBARRASSMENT. DEMIREL APPEARS TO HAVE BEEN GENERALLY SUCCESSFUL IN PERSUADING NAP LEADER TURKES TO REDUCE THE NUMBER OF COMMANDO PROVOCATIONS. (IN GENERAL THE DEMIREL GOVERNMENT HAS EARNED GOOD MARKS IN ITS HANDLING OF POTENTIALLY EXPLOSIVE STUDENT DISTURBANCES, DESPITE HEAVY RPP CRITICISMS THAT THE GOVERNMENT HAS ABUSED ITS MARTIAL LAW POWERS FOR PARTISAN PURPOSE.)

F. RECENT PUBLIC STATEMENTS BY SEVERAL POLITICAL LEADERS INDICATE THAT A MERGER OF THE NAP AND REPUBLICAN RELIANCE PARTIES AND INDEPENDENTS WITH THE JP IS BEING ACTIVELY SUPPORTED, ALTHOUGH WE HEAR VARYING SPECULATION ON WHETHER THIS MERGER WOULD OCCUR BEFORE OR AFTER THE OCTOBER SENATORIAL ELECTIONS. THE RIVAL DEMOCRATIC PARTY APPEARS MORIBUND AND MANY OF ITS LEADERS MAY BE WILLING TO REJOIN THE JP, ESPECIALLY IN THE EVENT OF THE PREVIOUSLY MENTIONED MERGER.

G. ORGANIZED LABOR IS NOT HAPPY WITH THE GOVERNMENT, BELIEVING THAT IT IS PARTIAL TO THE PRIVATE SECTOR AND ITS SEVERAL CHAMBERS OF COMMERCE, INDUSTRY AND EMPLOYERS. TO EXPRESS THIS UNEASY FEELING ABOUT THE GOVERNMENT AND ITS ASSOCIATION WITH THE PRIVATE BUSINESS SECTOR, THE CONFEDERATION OF TURKISH TRADE UNIONS ORGANIZED A PARTIALLY SUCCESSFUL 8 HOUR GENERAL STRIKE IN IZMIR ON JUNE 16.

## 2. FOREIGN POLCY PERFORMANCE:

DEMIREL'S CAUTIOUS APPROACH TO FOREIGN POLICY SEEMS STRONGLY CONDITIONED BY DOMESTIC POLITICAL CONSIDERATIONS, CHIEFLY CONFIDENTIAL

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(A) PROTECTING HIS GOVERNMENT AGAINST DAMAGING CRITICISM BY THE OPPOSITION, (B) AVOIDING A SPLIT WITHIN THE COALITION, AND (C) REBUILDING THE SUPPORT LOST BY THE JUSTICE PARTY IN THE 1973 ELECTIONS. NO DOUBT THE APPROACH OF PARTIAL SENATE ELECTIONS IN OCTOBER, IN WHICH HIS PARTY IS HEAVILY EXPOSED, HAS SHARPENED HIS SENSITIVITY TO THE BALLOT BOX IMPLICATIONS OF FOREIGN POLICY DECISIONS. PERHAPS IN PART BECAUSE HIS RIVAL ECEVIT IS THE HERO OF THE 1974 CYPRUS OPERATION, DEMIREL HAS STRESSED DOMESTIC MATTERS MORE THAN FOREIGN AFFAIRS IN PUBLIC STATEMENTS. DEMIREL MAY WELL SEE THE FOREIGN POLICY AREA AS ONE OF VULNERABILITY MORE THAN OPPORTUNITY FOR HIS GOVERNMENT. IN HIS HANDLING OF THE CYPRUS AND AEGEAN PROBLEMS, DEMIREL SO FAR HAS PROTECTED HIS GOVERNMENT AGAINST CRITICISM BOTH FOR NOT ATTEMPTING TO NEGOTIATE AND FOR MAKING CONCESSIONS IN NEGOTIATIONS. IN DEALING WITH THE U.S. ARMS EMBARGO, DEMIREL FIRST ALLOWED TIME FOR THE U.S.

CONGRESS TO CHANGE ITS DECISION; HIS SUBSEQUENT CALL FOR RENEGOTIATION OF OUR DEFENSE RELATIONSHIP HAS STIRRED STRONG OPPOSITION ATTACKS AS TOO SOFT BUT BASICALLY SEEMS A REALISTIC EFFORT TOWARD MOTIVATING U.S. ACTION FAVORABLE TO TURKEY, WHILE PROVIDING A DEFENSE AGAINST CHARGES THAT THE DEMIREL GOVERNMENT HAD DONE NOTHING IN RESPONSE TO THE EMBARGO.

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### 3. ECONOMIC PERFORMANCE:

A. WHEN THE DEMIREL GOVERNMENT TOOK OFFICE, IT INHERITED SERIOUS PROBLEMS OF INFLATION, UNEMPLOYMENT, OVER-CONSUMPTION, AND UNDERINVESTMENT THAT HAVE BEEN ENDEMIC IN TURKEY FOR THE PAST FEW YEARS, AND A WORSENING BALANCE OF PAYMENTS SITUATION. WITH A RAZOR-THIN MARGIN OF SUPPORT, THE DEMIREL GOVERNMENT HAS OPTED FOR PROMISES OF FIGHTING INFLATION AND LOWERING CONSUMER PRICES WHILE ADOPTING MEASURES TO INCREASE WAGES, SOCIAL

BENEFITS AND SUBSIDIES TO SPECIAL INTEREST GROUPS. THUS THE DEMIREL GOVERNMENT HAS ESSENTIALLY CONTINUED THE POLICIES OF ITS PREDECESSORS IN THE AREA OF PUBLIC WELFARE, WAGES AND SOCIAL BENEFITS. THIS HAS MEANT A PROPOSED INCREASE OF CIVIL SERVANTS' SALARIES, PROMOTING INCREASES IN SEVERANCE PAY AND EARLIER RETIREMENT FOR FEMALE WORKERS AND RAISING SOCIAL SECURITY  
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BENEFITS AND PENSIONS.

B. OTHER SUBSIDY PROGRAMS UNDERTAKEN BY THE DEMIREL GOVERNMENT, WHILE ALSO POLITICALLY ORIENTED, ARE DIFFERENT IN SCOPE, ALTHOUGH IT IS TOO EARLY TO JUDGE WHAT EFFECT THEY WILL HAVE ON THE ECONOMY AS A WHOLE. LOWERING THE PRICE OF FERTILIZER 35 PERCENT CAN BE SEEN AS A CALCULATED GAMBLE THAT ADDITIONAL FERTILIZER WILL RAISE PRODUCTION SUFFICIENTLY SO THAT URBAN FOOD SUBSIDIES CAN BE LOWERED WITHOUT CUTTING FARMERS' INCOMES. THE NEED FOR THE SUBSIDY PAID TO COTTON EXPORTERS TO MOVE THE GIGANTIC STOCKS ON HAND RESULTED FROM A DECISION BY LAST YEAR'S ECEVIT GOVERNMENT TO BUY ALL COTTON PRODUCED AT A FIGURE CONSIDERABLY ABOVE THE WORLD PRICE. SOME 200,000 TONS OF COTTON HAS BEEN EXPORTED IN THE PAST TWO MONTHS AT A COST TO THE TREASURY OF AROUND \$250 MILLION. MORE IMPORTANTLY, HOWEVER, THE DEMIREL GOVERNMENT HAS BEGUN TO RESTORE EXPORT EARNINGS AND CUT GOVERNMENT FINANCING CHARGES ON THE COTTON STOCKS HELD IN GOVERNMENT WAREHOUSES. SIMILARLY, THE 30-35 PERCENT CUT IN CEMENT AND STEEL PRICES COULD CAUSE LOSSES IN GOVERNMENT RUN PLANTS THUS NECESSITATING BUDGETARY SUBSIDIES. NEVERTHELESS, IT WAS AN ATTEMPT, WHICH SEEMS TO BE SUCCEEDING, TO RAISE THE TURKISH CONSTRUCTION INDUSTRY FROM ITS 1974 DOLDRUMS. IT COULD ALSO HELP TO MODERATE THE RISE IN CONSUMER PRICES.

C. ON THE NEGATIVE SIDE, THE DEMIREL GOVERNMENT HAS SHOWN LITTLE CONCERN WITH WHAT THE SUBSIDIES OUTLINED ABOVE WILL DO TO THE 1975 BUDGET. THE 1975 BUDGET ANTICIPATED A GAP BETWEEN RECEIPTS AND EXPENDITURES OF NINE BILLION LIRA (\$630 MILLION). RECENTLY APPROVED LEGISLATION FOR THE REORGANIZATION AND MODERATION OF THE ARMED SERVICES (REMO) AND CIVIL SERVICE PAY INCREASES WILL ADD RESPECTIVELY SIX BILLION (\$425 MILLION) AND 8.5 BILLION (\$600 MILLION) TO THE DEFICIT. SUBSIDIES TO SUPPORT COTTON EXPORTS AND ON FERTILIZERS WILL UNDOUBTEDLY ADD TO THE DEFICIT. ESTIMATES OF THE TOTAL BUDGETARY DEFICIT FOR 1975 MAY RUN AS HIGH AS 25 BILLION TURKISH LIRA (\$1.8 BILLION). THE DEMIREL GOVERNMENT SEEMINGLY HAS NO NEW REVENUE RAISING MEASURES UNDER CONSIDERATION. FINANCING A DEFICIT OF THIS SIZE THROUGH CENTRAL BANK CREDITS AND SALE OF GOVERNMENT BONDS WILL BE VERY DIFFICULT AND HIGHLY INFLATIONARY.  
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D. THE DEMIREL GOVERNMENT HAS BECOME INCREASINGLY CONCERNED ABOUT THE TURKISH TRADE DEFICIT AND LOSS OF FOREIGN EXCHANGE RESERVES. IN AN ATTEMPT TO ATTRACT NEW DEPOSITS, MORE LIBERAL BANKING PROCEDURES HAVE BEEN ADOPTED TO PERMIT TURKISH BANKS TO HOLD DEPOSITS IN FOREIGN EXCHANGE AND IF NECESSARY TO PAY INTEREST AT A RATE OF 1.75 PERCENT ABOVE THE EURO MARKET. RECENTLY CONCLUDED ECONOMIC AGREEMENTS WITH LIBYA AND IRAN MAY BRING ADDITIONAL FOREIGN LOANS TO TURKEY FOR MUTUALLY BENEFICIAL PROJECTS. IMPORTS ARE BEING SCRUTINIZED TO PREVENT PROFITEERING AND SPECULATIVE STOCK-PILING AS WELL AS TO ENSURE THAT COMMODITY PRICES REFLECT RECENT WORLD-WIDE DECLINES. THIS PROCEDURE HAS RECENTLY AFFECTED THREE U.S. FIRMS WHICH HAD SIGNED A CONTRACT WITH THE GOT IN OCTOBER, 1974 FOR THE DELIVERY OF 500,000 TONS OF WHEAT IN MID 1975. IN THE INTERIM, PRICES FELL DRASTICALLY AND TURKEY UNILATERALLY CANCELLED THE CONTRACTS.

E. IN LATE APRIL, THE DEMIREL GOVERNMENT MADE A DIFFICULT DECISION TO END, FOR THE TIME BEING, A LONG-STANDING DISPUTE INVOLVING MOBIL AND BP. PREVIOUS GOVERNMENTS HAD IMPOSED A PRICE FOR CRUDE OIL IMPORTS THAT THE TWO COMPANIES ASSERTED WAS UNREALISTIC. WHEN THEY SUBSEQUENTLY STOPPED IMPORTING OIL INTO TURKEY, MEASURES WERE INVOKED WHICH MIGHT HAVE LED TO NATIONALIZATION.

ON APRIL 30, SIX DAYS BEFORE THE DEADLINE, THE DEMIREL GOVERNMENT REACHED AGREEMENT WITH TWO COMPANIES ON AN IMPORT PRICE, THUS AVOIDING MORE DRASTIC ACTION AGAINST THE COMPANIES. THE RPP AND THE LEFT STRONGLY ATTACKED THE DEMIREL GOVERNMENT FOR THIS DECISION AND FOR MISSING AN OPPORTUNITY TO NATIONALIZE THE COMPANIES. THE GOVERNMENT HELD FIRM, INSISTING THAT IN A PERIOD OF UNCERTAIN ENERGY SUPPLIES, ALL METHODS, INCLUDING MULTINATIONAL OIL COMPANIES, HAD TO BE USED TO OBTAIN SUPPLIES FOR TURKEY.

F. TURKISH BUSINESS COMMUNITY IN PARTICULAR HAS WELCOMED FINANCIAL MEASURES TAKEN BY THE COALITION GOVERNMENT TO EASE CREDIT AND TO BOLSTER SAGGING FOREIGN EXCHANGE RESERVES. SEVERAL LEADING BANKERS HAVE COMMENTED THEY EXPECTED CONVERTIBLE CURRENCY DEPOSITS TO REACH \$200-250 MILLION BY THE END OF THE YEAR. THE UPSHOT OF LOOSENING CREDIT TO PRIVATE SECTOR

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IS THAT MANY TOP FIRMS WHOSE INVESTMENT ACTIVITIES HAVE BEEN DORMANT FOR THE PAST YEAR ARE NOW MOVING VIGOROUSLY

TO COMPLETE PLANTS UNDER CONSTRUCTION, AND ARE ALSO MAKING PLANS FOR NEW INVESTMENTS. IN GENERAL, SALES ARE BRISK, PARTICULARLY IN CONSUMER PRODUCT, WITH EXISTING CAPACITY UNABLE TO MEET PRESENT DEMAND. ADDITIONAL FACTOR BOLSTERING CONFIDENCE OF PRIVATE BUSINESS COMMUNITY IS EXPECTATION OF BETTER THAN USUAL AGRICULTURAL PRODUCTION THIS YEAR, WHICH MEANS THAT DEMAND WILL REMAIN HIGH, AT LEAST THROUGH THE END OF THE YEAR. IN GENERAL, WE DETECT A SLIGHTLY MORE POSITIVE AND CONFIDENT ATTITUDE OF THE PART OF PRIVATE BUSINESS COMMUNITY TOWARD THE COALITION GOVERNMENT AND THE ECONOMY IN GENERAL, DESPITE THE MANY PROBLEMS (INFLATION, FOREIGN EXCHANGE DETERIORATION, TRADE BALANCE) THAT THE LATTER IS FACING.

4. SUMMING UP THE DEMIREL GOVERNMENT HAS TURNED IN A RELATIVELY CREDITABLE PERFORMANCE DURING ITS FIRST TWO MONTHS AND SEEMS FOR THE MOMENT TO BE RIDING AN UPWARD WAVE OF SUPPORT; DEMIREL'S SUCCESS IN HOLDING HIS GOVERNMENT TOGETHER AND THE OUTCOME OF HIS ECONOMIC PROGRAMS PROBABLY WILL DETERMINE HOW FAR AND HOW LONG THAT WAVE WILL CARRY HIM.

5. THE CONSULATE GENERAL AT ISTANBUL CONTRIBUTED TO THE PREPARATION OF THIS REPORT.

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